



## Lesson 8: *SAMS*

### Lesson Description

In Lesson 8 the APC and LAPC will learn to provide and maintain security access to PCMS. This is the final lesson in the APC\LAPC PCMS training course.

### Training Objectives

At the conclusion of this lesson, APC's and LAPC's will be able to:

1. Add or Drop Users
2. Insert or Remove Security Access Code (SAC) information
3. Modify Data
4. Change Passwords

### Methodology

This lesson will be delivered using a combination of lecture and presentation, and discussion. Group discussion and trainee interaction will be used to stimulate recall of policy information and establish a knowledge base on which to build in subsequent lessons.

### References

- (1) SAMS User's Guide for the Purchase Card, OPP&EP\PMT, Rev. September 2000
- (2) APC/LAPC PCMS Quick Guide for Managing Purchase Cardholder Accounts, OPP&EP\PMT, December 2000
- (3) APC/LAPC PCMS User's Guide, OPP&EP\PMT, August 2000

### Enclosures

None.

## I. SAMS Overview



Please turn off your monitor and give your attention to the instructor.

### a. What is SAMS?

The Security Access Management System (SAMS) is a Windows-based system used to establish user access to the Purchase Card Management System (PCMS) at the National Finance Center (NFC). SAMS has a graphical user interface, which provides the capability to enter security access requests online.

### b. Workflow

When a new record is created in CAMS, a skeletal record for the Cardholder is concurrently established in SAMS. Once the bank establishes a Cardholder's account, SAMS is updated with the Cardholder's account number. The LAPC can then enter SAMS, complete the record, and establish PCMS access for the Cardholder.

### c. Software Installation

SAMS software is part of the PCMS installation package. Installation instructions are detailed in Pages I-1 through I-5 of Reference (3), the *APC/LAPC PCMS User's Guide*.

## II. Logging On to SAMS

Click on the SAMS icon (Figure 8-1) on your Windows Desktop.

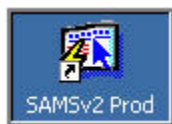


Figure 8-1

Alternatively, you can access SAMS from your Windows Desktop by clicking *Start>Programs>Purchase Card Management System Ver 4.0>PCMSv4 Prod*. See Figure 8-2 below.

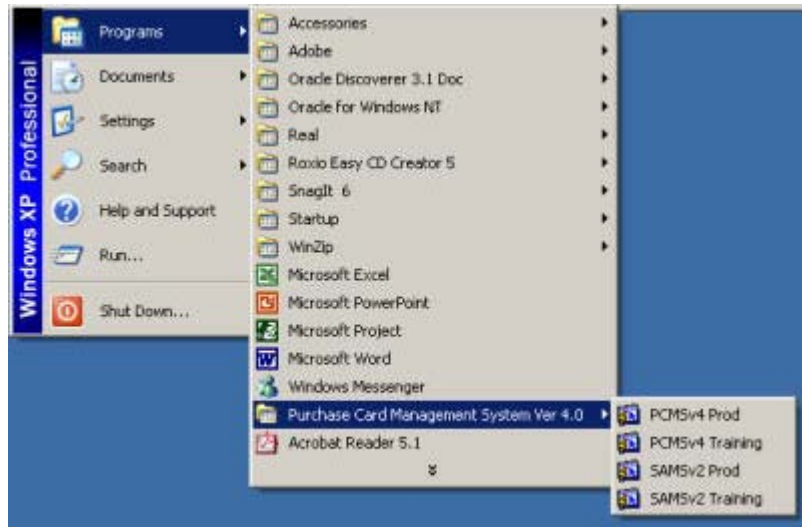


Figure 8-2

A 'Warning' message, shown in Figure 8-3 below, will appear. Click  to proceed.

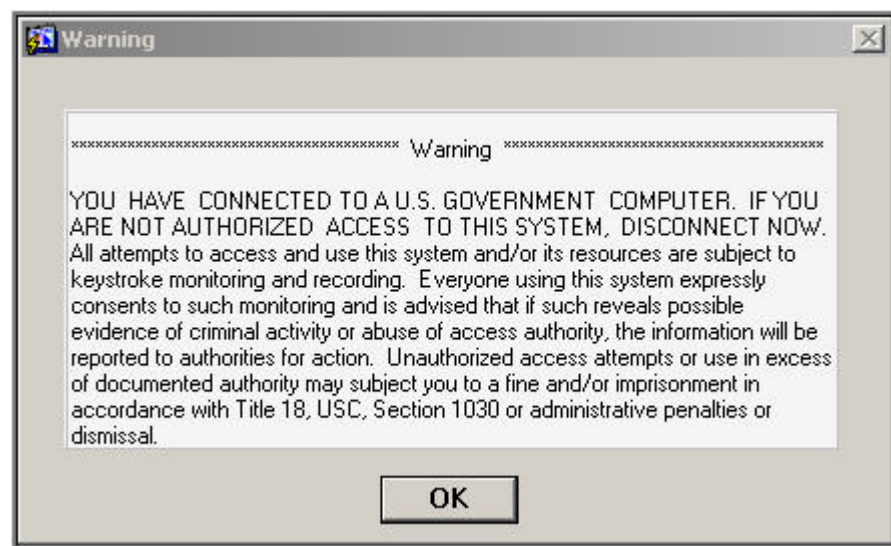



Figure 8-3

Next, the *Logon* window will appear. Enter your *Username* and *Password*, and click  .

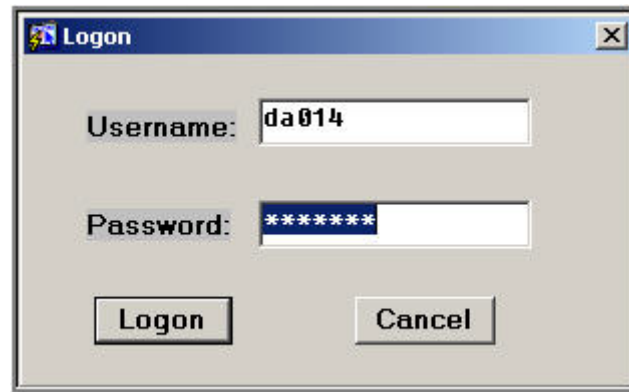


Figure 8-4

If you erred in entering your *Username* or *Password*, you will see the error message shown in Figure 8-5.

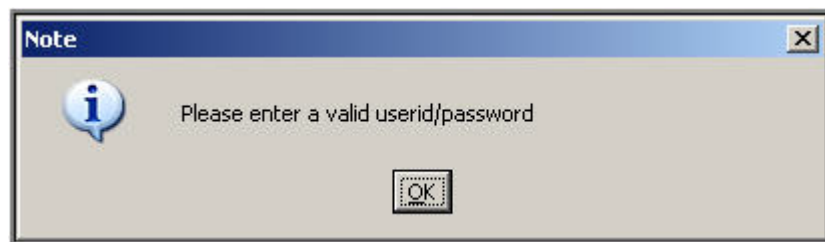


Figure 8-5

**Note:** Your *Password* will expire every ninety (90) days, and you will be prompted to create a new one.

When you successfully enter a valid *Username* and *Password*, you will see the SAMS *Main Menu* shown in Figure 8-5.

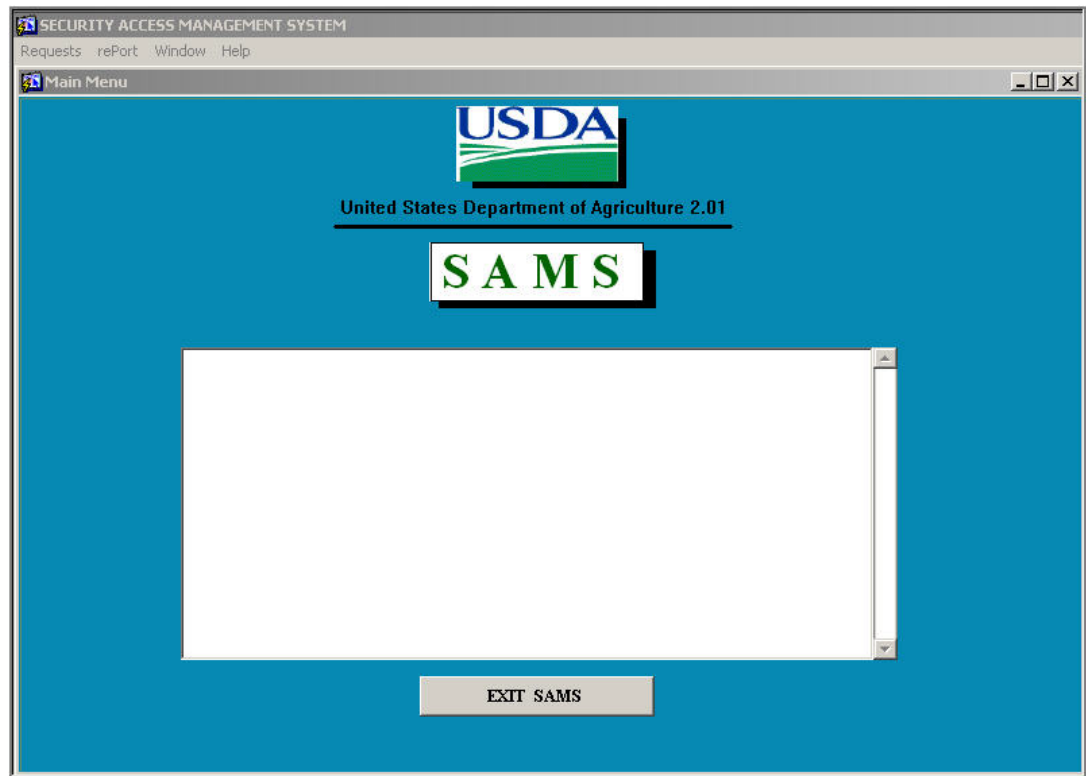


Figure 8-5

### III. Main Menu

#### a. SAMS Bulletin Board

A large white field appears at the center of the *Main Menu*. This is the SAMS *Bulletin Board*. The Departmental Program Administrator (DPC) and System Administrators will utilize the *Bulletin Board* to provide current system-related information to SAMS users.

- b. **Tool Bar.** The *Main Menu* tool bar, seen at the top of Figure 8-5 and isolated in Figure 8-6 below, contains four (4) separate drop-down menus used for various SAMS operations.



Figure 8-6

1. **Requests** – Allows the APC/LAPC to add, modify or drop a Cardholder's PCMS access. The *Requests* function will be discussed at length later in this lesson.
2. **Report** – Produces the *Security Management Report*, which lists all records within the SAMS user's access that have been added or altered prior to a specified date. The *rePort* function will be covered in more detail later in this lesson.
3. **Window** – Unnecessary feature for SAMS operations. Will not be covered.
4. **Help** – The *Keys* and *List* options are useful references, and will be briefly covered later in this lesson.

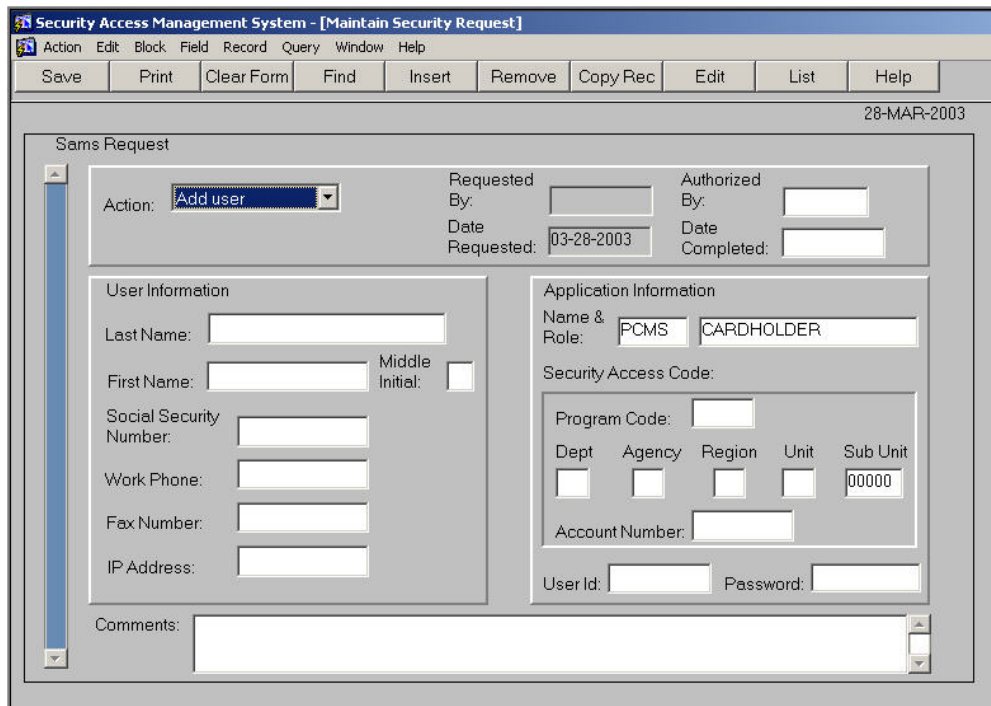
## IV. Establishing Usernames

The information entered into SAMS is used to create a *Username* or *User Id*, role(s), security profile, and *Security Access Code* (SAC) information. The role (e.g. APC, LAPC, Cardholder, etc.) defines the PCMS options to which a user has access. The SAC, which defines the amount of information a user can see, may consist of any of the following: *Department Code*, *Agency Code*, *Region*, *Unit*, and *Sub Unit*. Note: If PCMS User has a valid NFC System Id, he/she must provide existing User Id to be used in establishing any new roles within PCMS.

DPC's use SAMS to request access to PCMS for Area Program Coordinators (APCs). APCs use SAMS to request access to PCMS for Local Agency Program Coordinators (LAPCs). LAPCs use SAMS to request access to PCMS for other LAPCs, Cardholders, and Financial Managers (FM). The process used by APCs and LAPCs to enter requests for access in SAMS will be discussed in greater detail in the subsequent section.

## 1. Requests

To initiate an access request, logon to SAMS following the steps outlined in Section II above, and click on *Requests* at the tool bar previously shown in Figure 8-6. The *Sams Request* page shown in Figure 8-7 will appear.




The screenshot shows the 'Security Access Management System - [Maintain Security Request]' window. The window has a menu bar with 'Action', 'Edit', 'Block', 'Field', 'Record', 'Query', 'Window', and 'Help'. Below the menu bar is a toolbar with buttons: 'Save', 'Print', 'Clear Form', 'Find', 'Insert', 'Remove', 'Copy Rec', 'Edit', 'List', and 'Help'. The date '28-MAR-2003' is displayed in the top right corner.

The main form is titled 'Sams Request'. It contains the following sections:

- Action:** A dropdown menu with 'Add user' selected.
- Requested By:** A text field.
- Authorized By:** A text field.
- Date Requested:** A text field with the value '03-28-2003'.
- Date Completed:** A text field.
- User Information:**
  - Last Name:** A text field.
  - First Name:** A text field.
  - Middle Initial:** A text field.
  - Social Security Number:** A text field.
  - Work Phone:** A text field.
  - Fax Number:** A text field.
  - IP Address:** A text field.
- Application Information:**
  - Name & Role:** A text field with 'PCMS' and 'CARDHOLDER'.
  - Security Access Code:**
    - Program Code:** A text field.
    - Dept:** A text field.
    - Agency:** A text field.
    - Region:** A text field.
    - Unit:** A text field.
    - Sub Unit:** A text field with the value '00000'.
  - Account Number:** A text field.
  - User Id:** A text field.
  - Password:** A text field.
- Comments:** A large text area at the bottom.

Figure 8-7

## 2. Adding a New User

The first field on this screen is *Action*. *Add user* is the default action. Click  to open the drop-down list, and review other *Action* options.

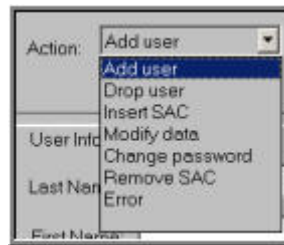


Figure 8-8

The *Requested By* and *Date Requested* fields are automatically populated. *Authorized By* is an optional field, in which the *User Id* of the authorizing individual may be recorded. *Date Completed* will be entered automatically, once the request is processed as part of a batch process, and accepted.


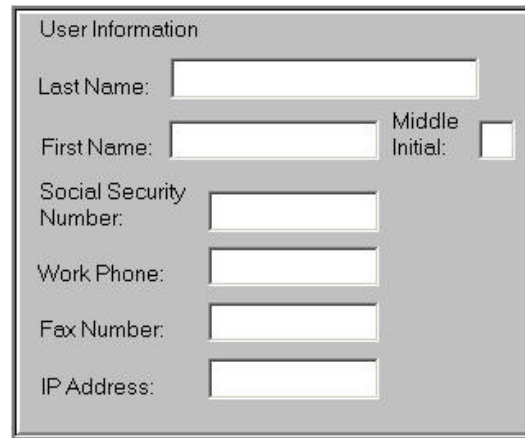
|         |   |                 |                      |                 |                      |
|---------|---|-----------------|----------------------|-----------------|----------------------|
| Action: |  | Requested By:   | <input type="text"/> | Authorized By:  | <input type="text"/> |
|         | Add user  | Date Requested: | 03-28-2003           | Date Completed: | <input type="text"/> |

Figure 8-9



### 3. User Information

This block of the *Sams Request* page is used to enter identifying and contact information on the subject of the request. See Figure 8-10 below. When entering information in this and other fields of the *Sams Request* page, you can navigate by using either the Tab key or mouse to select a field for data entry.



**Figure 8-10**

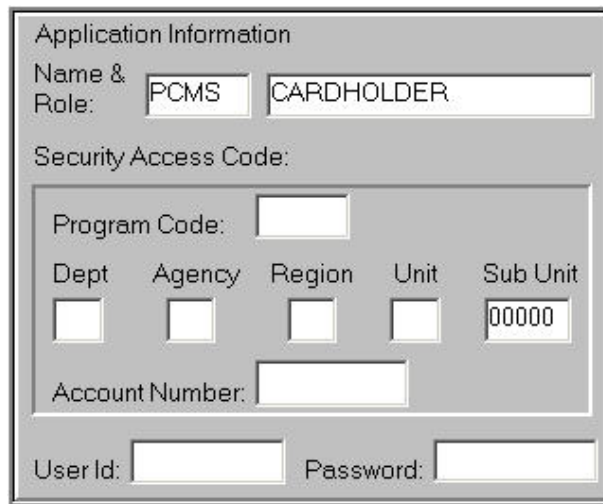
Table 8-A below describes the fields within the *User Information* block, mandatory or optional, which may be used to add a user.

| Fieldname                     | Required | Description   |
|-------------------------------|----------|---|
| <b>Last Name</b>              | Yes      | The User's last name.   |
| <b>First Name</b>             | Yes      | The User's first name.  |
| <b>Middle Initial</b>         | No       | The User's middle initial.  |
| <b>Social Security Number</b> | Yes      | The User's 9-digit Social Security Number, with no dashes or breaks. This is verified against Payroll information |
| <b>Work Phone</b>             | Yes      | The User's 10-digit work phone number, with no parentheses, dashes or breaks.                                     |
| <b>Fax Number</b>             | Yes      | The User's 10-digit fax number, with no parentheses, dashes or breaks.  |
| <b>IP Address</b>             | No       | The User's Internet Protocol (IP) address (e.g. 199.145.120.67)   |

**Table 8-A**

#### 4. Application Information

The *Application Information* block of the *Sams Request* page, shown in Figure 8-11 below, contains data entry fields that allow the APC/LAPC to establish or change a PCMS user's *Name & Role*, *Security Access Code*, *User Id* and/or *Password*.



Application Information

Name & Role: PCMS CARDHOLDER

Security Access Code:

Program Code:

Dept Agency Region Unit Sub Unit

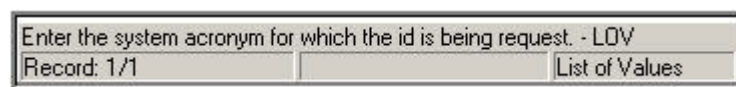
00000

Account Number:

User Id: Password:

Figure 8-11


By default, the *Name & Role* that appears in the *Application Information* block is *PCMS / CARDHOLDER*. Click in the *Name & Role* field where the default *PCMS* appears. Note that a comment, *Enter the system acronym for which the id is being request – LOV*, appears in the lower left-hand corner of the SAMS window. See Figure 8-12.

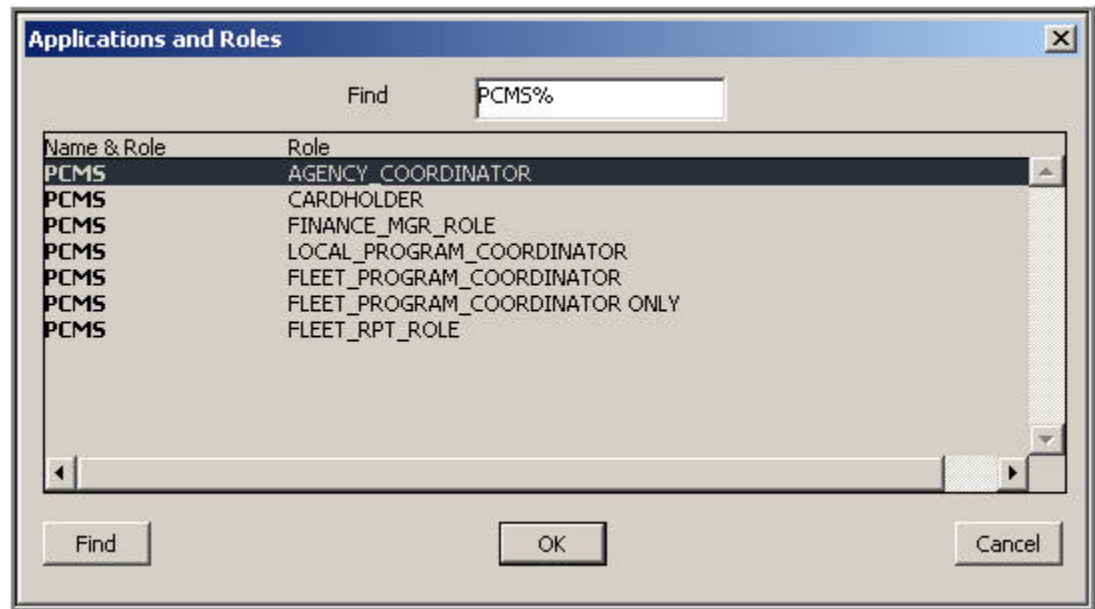


Enter the system acronym for which the id is being request. - LOV


Record: 1/1 List of Values

Figure 8-12

*LOV*, an acronym for *List of Values*, indicates that a list of values for this field is available. To see this list, click on , which is in the row of buttons immediately beneath the tool bar at the top of the SAMS window. The *Applications and Roles* window will appear, containing the list of values for the *Name & Role* fields. See Figure 8-13 below.



**Figure 8-13**

Using your mouse, select the correct *Name & Role*, and click .

Note 1: SAMS can only establish one (1) role per transaction. For more information on *Roles*, see Appendix A of Reference (1), *SAMS User's Guide for the Purchase Card*.

Note 2: New User has an existing User Id for an NFC System other than PCMS, this User Id should be used for PCMS.

## 5. Security Access Code

Next, within the *Application Information* block, is the *Security Access Code* information. See Figure 8-14 below. APCs, LAPCs and Cardholders should only have access to those areas necessary for them to carry out their responsibilities. This access is governed, within SAMS, by limiting PCMS users by appropriate *Department*, *Agency*, *Region*, *Unit*, *Sub Unit* and/or *Account Number*.

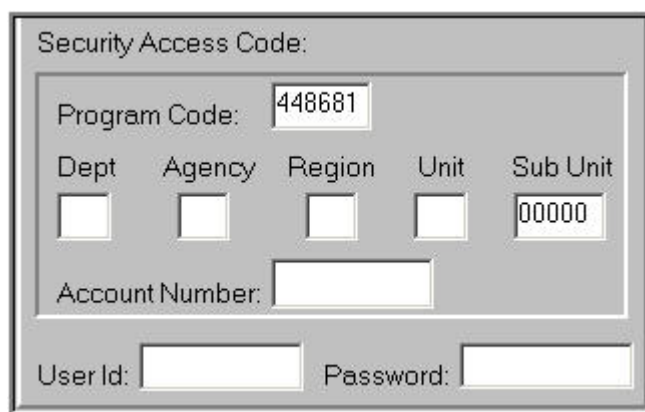


Figure 8-14

Table 8-B provides a description of each of the fields within the SAC area of SAMS.

| Fieldname             | Required | Description  |
|-----------------------|----------|--|
| <b>Program Code</b>   | Yes      | A six-digit code automatically populated when <i>Name &amp; Role</i> is selected.  |
| <b>Dept</b>           | Yes      | Enter a two-digit <i>Dept</i> code. USDA's <i>Dept</i> code is <b>12</b> .   |
| <b>Agency</b>         | Yes      | Enter a two-digit <i>Agency</i> code.  |
| <b>Region</b>         | Yes      | Enter a two-digit <i>Region</i> code. If no <i>Region</i> is to be specified, enter <b>00</b> .  |
| <b>Unit</b>           | Yes      | Enter a two-digit <i>Unit</i> code. If no <i>Unit</i> is to be specified, enter <b>00</b> .  |
| <b>Sub Unit</b>       | Yes      | Enter a five-digit <i>Sub Unit</i> code. Use leading zeros, if <i>Sub Unit</i> code is less than five-digits. If no <i>Sub Unit</i> is to be specified, enter <b>00000</b> . |
| <b>Account Number</b> | Yes      | For LAPCs, a default <i>Account Number</i> of <b>0000000000</b> will automatically be entered. For a Cardholder, enter a ten-digit <i>Account Number</i> .                   |

Table 8-B


| Fieldname | Required | Description  |
|-----------|----------|--|
| User Id   | Yes      | <ul style="list-style-type: none"> <li>If assigning a new role, and the subject of the SAMS request has an existing SAMS <i>User Id</i>, enter existing <i>User Id</i> into the <i>User Id</i> field with an <i>A</i> or a <i>B</i> appended to the end, e.g. <i>DA014A</i></li> <li>If not, ensuring your cursor is positioned in the <i>User Id</i> field, click on , and select an <i>Unassigned User Id</i> assigned for your use by ACFO-FS. See Figure 8-15.</li> </ul> |
| Password  | Yes      | <ul style="list-style-type: none"> <li>Must begin with a letter.</li> <li>Must be 6-8 characters in length.</li> <li>Must contain both letters and numbers.</li> </ul>   |
| Comments  | No       | Any <i>Comments</i> that may be useful in establishing a clear record.   |

Table 8-B (Cont.)

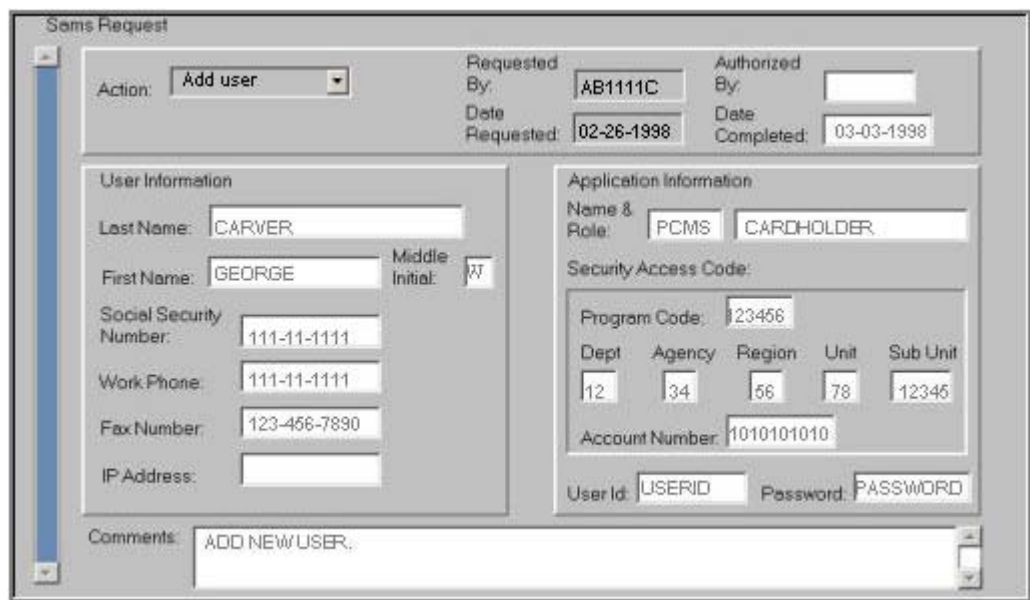


Figure 8-15

## 6. Drop User

Ensure all Cardholder's records are transferred to the LAPC or another Cardholder before terminating system access to PCMS.

Next, call up a record previously processed for the User. From the *Sams Request* window, click on . Note that the *Action* block will be cleared. Next, enter the User's *Account Number*, and click  again. Your *Sams Request* page will appear similar to Figure 8-16 below.



The screenshot shows the 'Sams Request' window with the following fields and values:

- Action:** Add user (dropdown)
- Requested By:** AB1111C
- Authorized By:** (empty)
- Date Requested:** 02-26-1998
- Date Completed:** 03-03-1998
- User Information:**
  - Last Name:** CARVER
  - First Name:** GEORGE
  - Middle Initial:** AT
  - Social Security Number:** 111-11-1111
  - Work Phone:** 111-11-1111
  - Fax Number:** 123-456-7890
  - IP Address:** (empty)
- Application Information:**
  - Name & Role:** PCMS CARDHOLDER
  - Security Access Code:**
    - Program Code:** 123456
    - Dept:** 12
    - Agency:** 34
    - Region:** 56
    - Unit:** 78
    - Sub Unit:** 12345
  - Account Number:** 1010101010
  - User Id:** USERID
  - Password:** PASSWORD
- Comments:** ADD NEW USER.

Figure 8-16

Alternatively, you can search for a record using other personal identifying information, such as *Social Security Number* or *User Id*. You could also use *Last Name* and *First Name* as search criteria (e.g. John Smith); however, you may retrieve multiple records using this method. Ensure you select and drop only the intended User.

Once you've identified an existing record of the User to be dropped, click **Copy Rec**. The *Forms* message in Figure 8-17 will appear. Click **OK** to create a copy of the record retrieved, and proceed.



**Figure 8-17**

Note that the copied record now displayed is identical to the record retrieved, with two (2) exceptions; the *Action* and *Date Completed* blocks are now blank.

Select *Drop user* from the *Action* (See Figure 8-18), and enter any data (optional) in the *Authorized By* and/or *Comments* fields, and click **Save**.

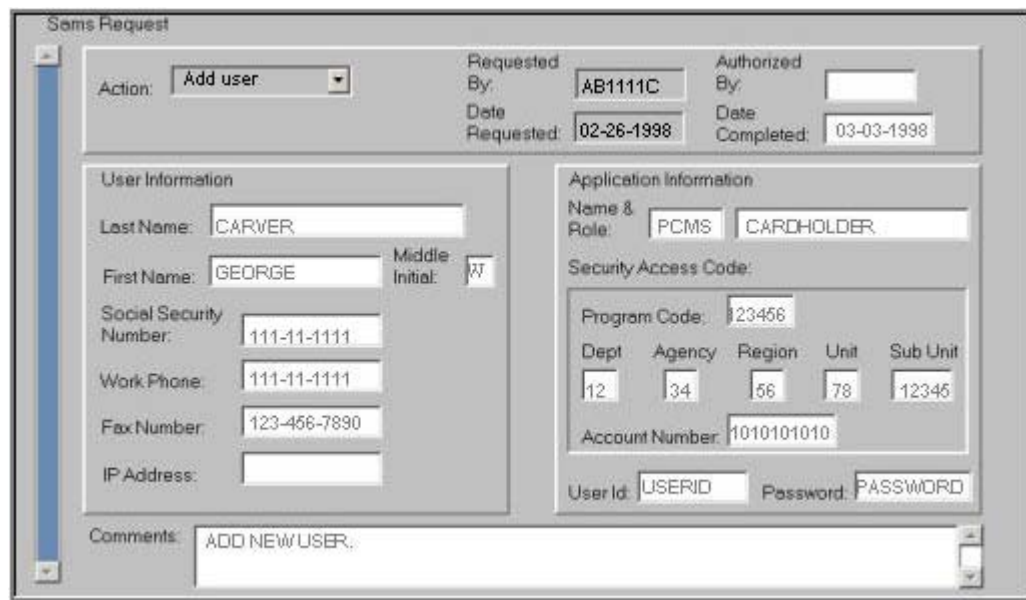


**Figure 8-18**

## 7. Insert SAC

The *Insert SAC* action is used to provide the User with an additional SAC. This type of action may be utilized when, for example, an LAPC is assigned the oversight responsibility for an additional *Unit* or *Sub Unit*.

Call up a record previously processed for the User. From the *Sams Request* window, click on  , enter the User's *Account Number*, and click  again.



The screenshot shows the 'Sams Request' window. At the top, there's a section for 'Action' with a dropdown menu set to 'Add user'. To the right, there are fields for 'Requested By' (AB1111C), 'Date Requested' (02-26-1998), 'Authorized By' (empty), and 'Date Completed' (03-03-1998). Below this, the window is divided into two main sections: 'User Information' and 'Application Information'. The 'User Information' section includes fields for 'Last Name' (CARVER), 'First Name' (GEORGE), 'Middle Initial' (W), 'Social Security Number' (111-11-1111), 'Work Phone' (111-11-1111), 'Fax Number' (123-456-7890), and 'IP Address' (empty). The 'Application Information' section includes 'Name & Role' (PCMS CARDHOLDER), 'Security Access Code' (empty), a table for 'Program Code' (123456), and a table for 'Account Number' (1010101010). The table for 'Account Number' has columns for 'Dept' (12), 'Agency' (34), 'Region' (56), 'Unit' (78), and 'Sub Unit' (12345). At the bottom, there are fields for 'User Id' (USERID) and 'Password' (PASSWORD), and a 'Comments' field with the text 'ADD NEW USER'.

Figure 8-19

Once you've identified an existing record of the User to insert a SAC, click  . Click  to create a copy of the record retrieved, and proceed.

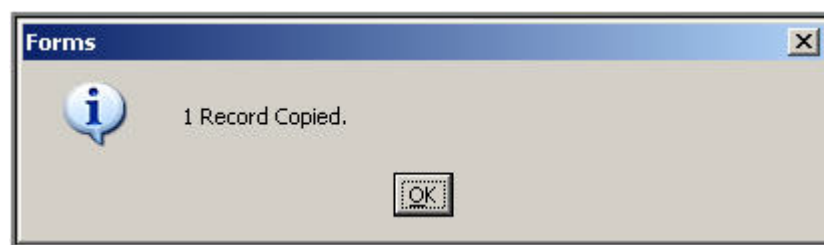


Figure 8-20

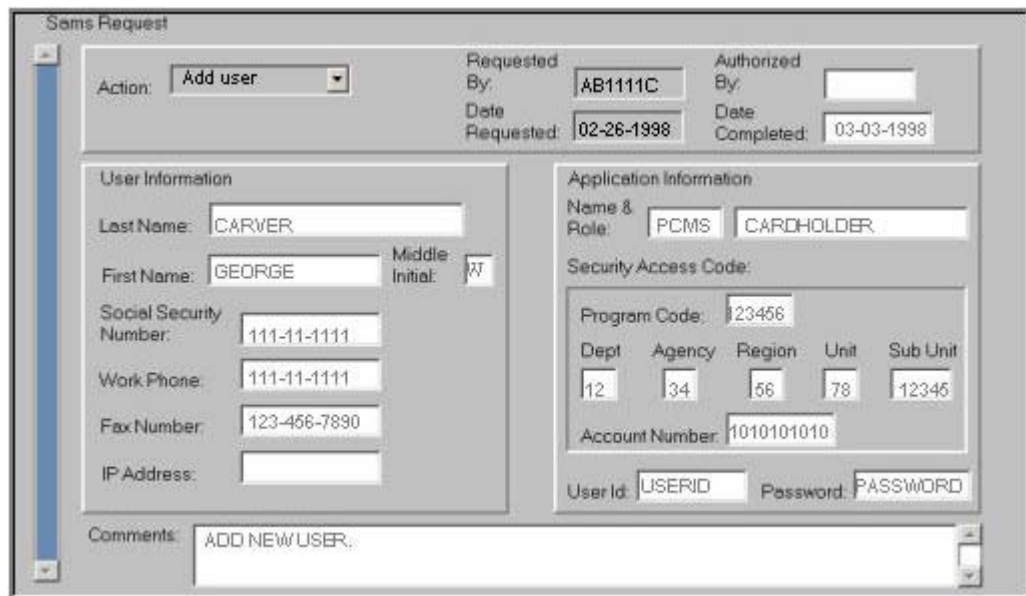


Select *Insert SAC* from the *Action* field drop-down list, and enter the additional SAC (e.g. *Unit* or *Sub Unit*). Then, add any data (optional) in the *Authorized By* and/or *Comments* fields, and click  .

## 8. Remove SAC

The *Remove SAC* action is used to remove an SAC that is no longer required, or one that may have been erroneously assigned. This action will not affect other, existing SACs. Prior to undertaking a *Remove SAC* action, ensure all records related to this User and SAC are attached to another User.

To remove an SAC, from the *Sams Request* window, click on  . For the best result, enter the User's *User Id* and SAC information (e.g. *Unit* or *Sub Unit* to be removed), and click  again.



The screenshot shows the 'Sams Request' window with the following fields and values:

- Action:** Add user (dropdown)
- Requested By:** AB1111C
- Authorized By:** (empty)
- Date Requested:** 02-26-1998
- Date Completed:** 03-03-1998
- User Information:**
  - Last Name:** CARVER
  - First Name:** GEORGE
  - Middle Initial:** W
  - Social Security Number:** 111-11-1111
  - Work Phone:** 111-11-1111
  - Fax Number:** 123-456-7890
  - IP Address:** (empty)
- Application Information:**
  - Name & Role:** PCMS CARDHOLDER
  - Security Access Code:**
    - Program Code:** 123456
    - Dept:** 12, **Agency:** 34, **Region:** 56, **Unit:** 78, **Sub Unit:** 12345
    - Account Number:** 1010101010
  - User Id:** USERID, **Password:** PASSWORD
- Comments:** ADD NEW USER.

Figure 8-21

Once you've correctly identified an existing record of the User/SAC to be modified, click **Copy Rec** . Click **OK** to create a copy of the record retrieved, and proceed.



Figure 8-22

Select *Remove SAC* from the *Action* field drop-down list, add any data (optional) in the *Authorized By* and/or *Comments* fields, and click **Save** . See Figure 8-23 below.

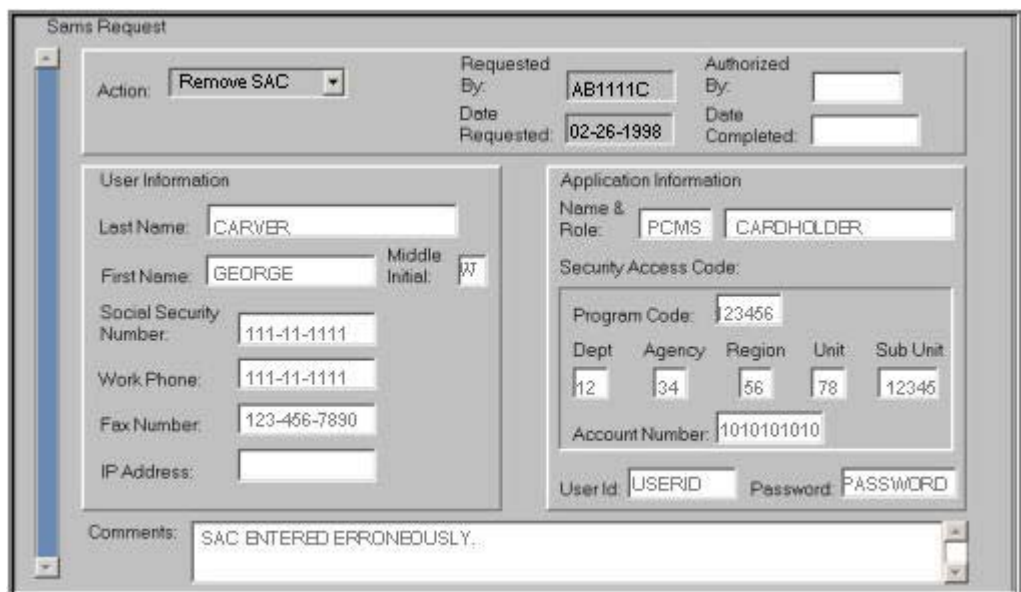
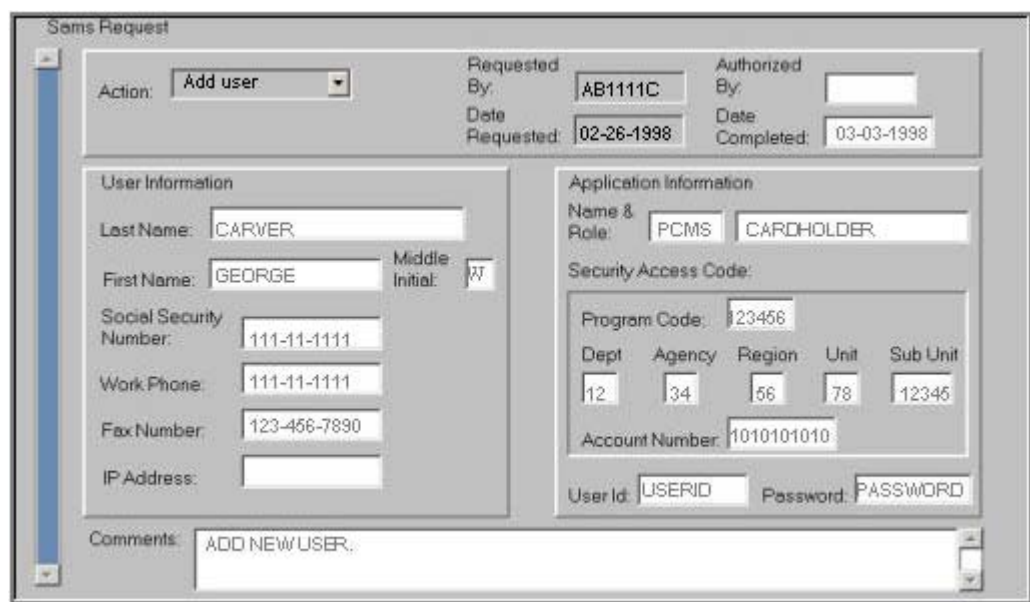


Figure 8-23

## 9. Modify Data

The *Modify data* operation is used to modify *User Information* displayed on the *Sams Request* page, such as *Last Name*, *First Name*, *Social Security Number*, or *Work Phone*.

To perform a *Modify data* operation, from the *Sams Request* page, click on . For the best result, enter the User's *User Id*. Alternatively, you may also use *Last Name* and *First Name* or *Social Security Number*. Then click  again.



The screenshot shows the 'Sams Request' form. The 'Action' dropdown is set to 'Add user'. The 'Requested By' field contains 'AB1111C' and the 'Date Requested' is '02-26-1998'. The 'Authorized By' field is empty and the 'Date Completed' is '03-03-1998'. The 'User Information' section includes fields for 'Last Name' (CARVER), 'First Name' (GEORGE), 'Middle Initial' (AT), 'Social Security Number' (111-11-1111), 'Work Phone' (111-11-1111), 'Fax Number' (123-456-7890), and 'IP Address'. The 'Application Information' section includes 'Name & Role' (PCMS CARDHOLDER), 'Security Access Code', 'Program Code' (123456), a table with columns 'Dept', 'Agency', 'Region', 'Unit', and 'Sub Unit' containing values 12, 34, 56, 78, and 12345 respectively, 'Account Number' (1010101010), 'User Id' (USERID), and 'Password' (PASSWORD). The 'Comments' field contains 'ADD NEW USER'.

Figure 8-24

Ensure that you select the most current record of the User's to copy, and that the *Date Completed* field is populated (See Figure 8-25), indicating the record has been batch processed and stored. Then click . Click  to create a copy of the record retrieved, and proceed.

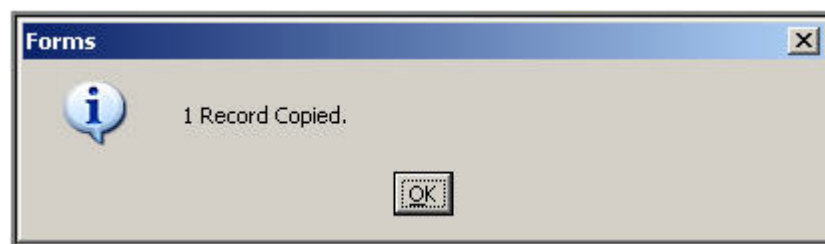
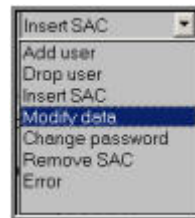
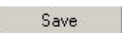


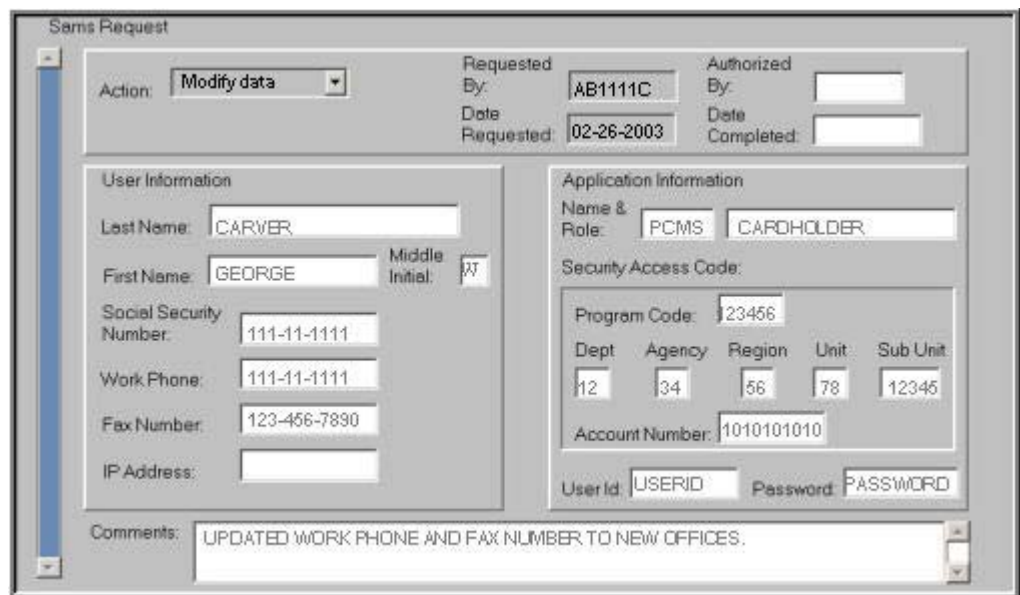
Figure 8-25

Select *Modify data* from the *Action* field drop-down list. See Figure 8-26 below.



**Figure 8-26**

Add any data (optional) in the *Authorized By* and/or *Comments* fields, and click . See Figure 8-27 below.

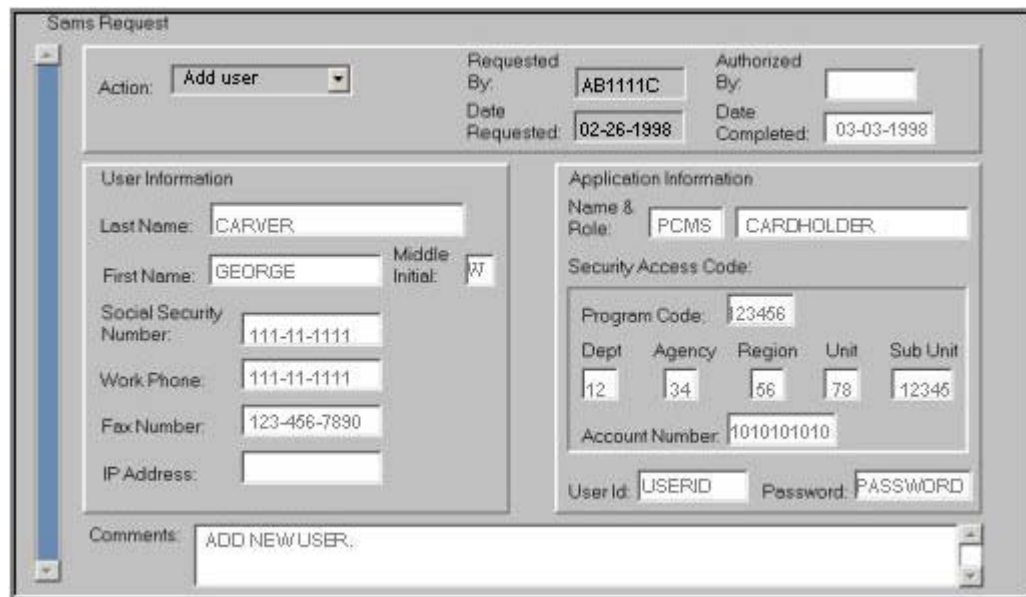


**Figure 8-27**

## 10. Change Password

Periodically, Users will need assistance in changing their passwords. The *Change password* option in the *Action* field of the *Sams Request* page provides the ability to accomplish this necessary administrative task.

To perform a *Change password* operation, from the *Sams Request* window, click on . For the best result, enter the User's *User Id*. Alternatively, you may also use *Last Name* and *First Name* or *Social Security Number*. Then click  again.



The screenshot shows the 'Sams Request' window. At the top, there's a section for 'Action' with a dropdown menu set to 'Add user'. To the right, there are fields for 'Requested By' (AB1111C), 'Authorized By' (empty), 'Date Requested' (02-26-1998), and 'Date Completed' (03-03-1998). Below this, the window is divided into two main sections: 'User Information' and 'Application Information'. The 'User Information' section includes fields for 'Last Name' (CARVER), 'First Name' (GEORGE), 'Middle Initial' (W), 'Social Security Number' (111-11-1111), 'Work Phone' (111-11-1111), 'Fax Number' (123-456-7890), and 'IP Address' (empty). The 'Application Information' section includes 'Name & Role' (PCMS CARDHOLDER), 'Security Access Code' (empty), 'Program Code' (123456), a table with columns 'Dept', 'Agency', 'Region', 'Unit', and 'Sub Unit' containing values 12, 34, 56, 78, and 12345 respectively, 'Account Number' (1010101010), 'User Id' (USERID), and 'Password' (PASSWORD). At the bottom, there's a 'Comments' field with the text 'ADD NEW USER'.

Figure 8-28

Ensure that you select the most current record of the User's to copy, and that the *Date Completed* field is populated (See Figure 8-28), indicating the record copied has been batch processed and stored. Then click .

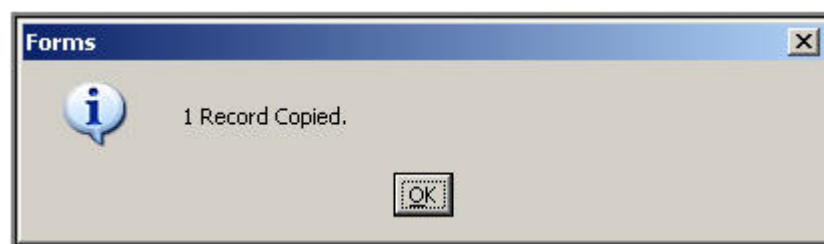


Figure 8-29

Click  to create a copy of the record retrieved, and proceed.


Select *Change password* from the *Action* field drop-down list. See Figure 8-30 below.

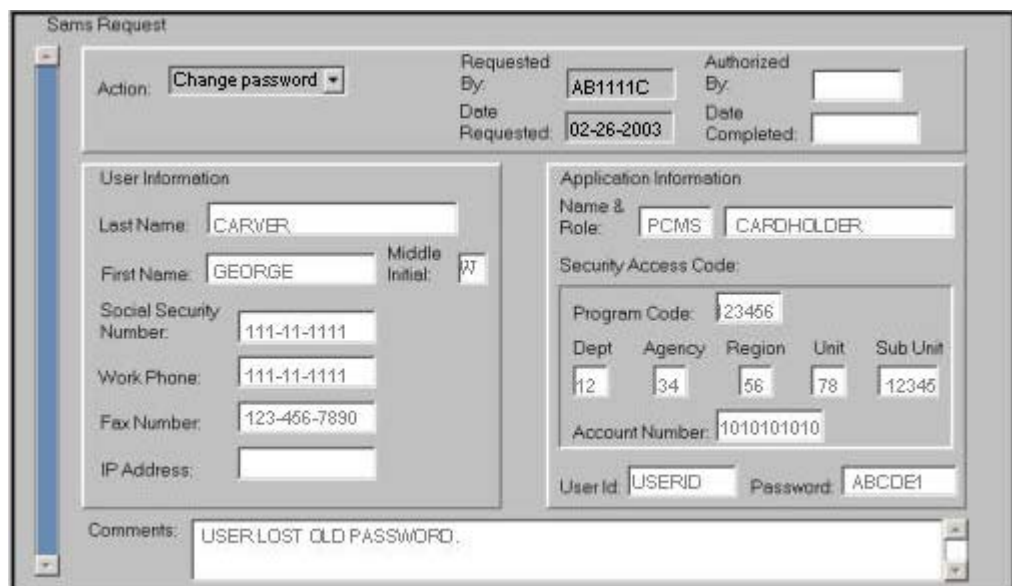


**Figure 8-30**

Go to the *Password* field in the *Application Information* of the *Sams Request* page, and change the password. The new password must conform to the following description:

- At least 6 characters in length.
- Begin with a letter.
- Be alphanumeric, containing at least one (1) letter and (1) one number.
- No spaces.
- Differ from previous User password by at least one (1) characters.

Add any data (optional) in the *Authorized By* and/or *Comments* fields, and click . See Figure 8-31 below.



**Figure 8-31**

## 11. Error

In order to perform most of the operations listed in the *Action* field of the *Sams Request* page and previously discussed in this Lesson, it is necessary to first locate the most recent PCMS User record, and then copy that record to perform an operation. When searching for most current PCMS User record for an action, if *Error* appears (See Figure 8-32) in the *Action* field of the *Sams Request* page, you may **NOT** proceed with a new operation until the *Error* is corrected.

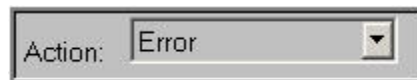


Figure 8-32

The cause of the *Error* is identified in the *Comments* field of the *Sams Request* page at the bottom of the screen. See Figure 8-33 below.



Figure 8-33

Correct the *Error* by making a copy of the page, and then correcting the data entry that caused the *Error*. Once the corrected transaction is complete and processed, the *Error* in the *Action* field will change to reflect the appropriate operation, e.g. *Change password*, and the *Date Completed* field of the *Sams Request* page will be populated by PCMS.

## V. Reports

To access SAMS' Report module, logon to SAMS using the same method as for SAMS *Requests*.

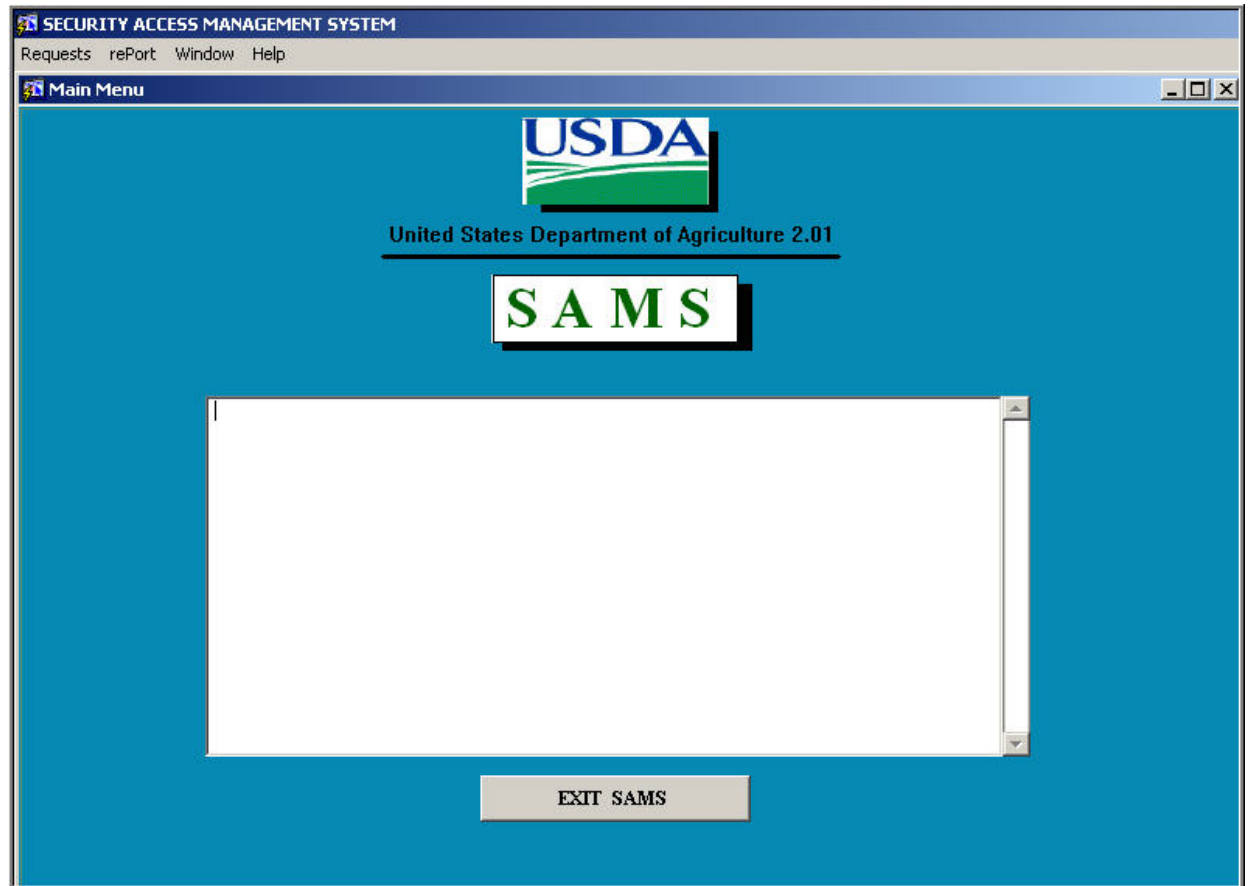


Figure 8-34

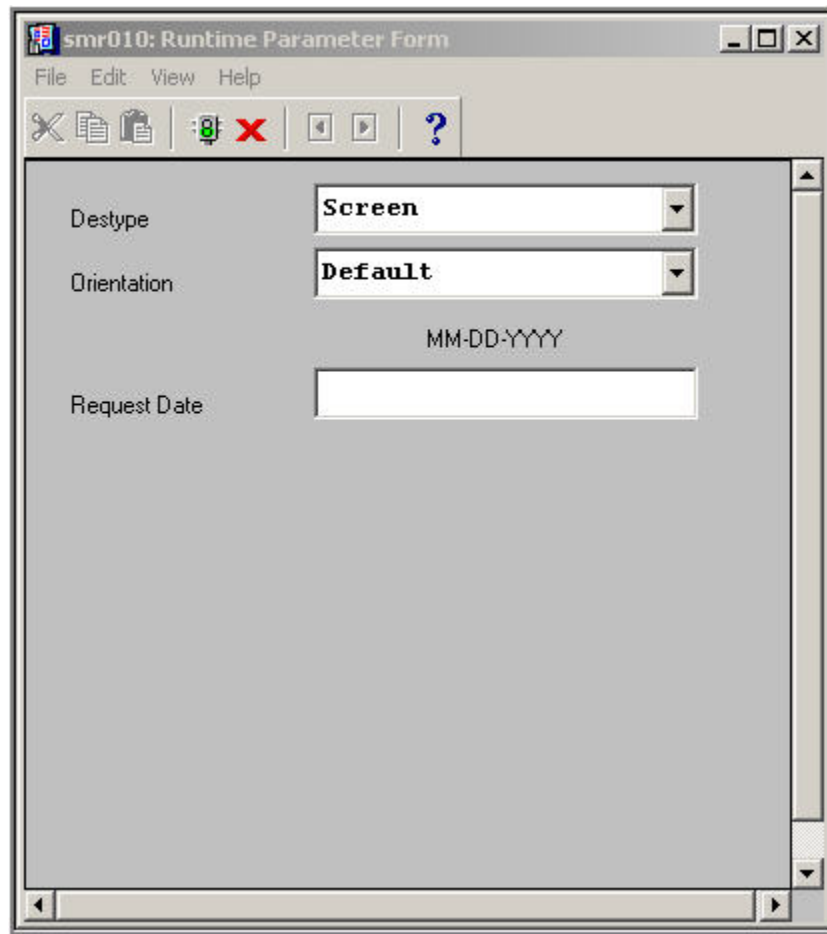
At the SAMS *Main Menu* (Figure 8-34), click on *rePort* on the tool bar at the top of the screen. Figure 8-35 shows the *Main Menu* tool bar in greater detail.



Figure 8-35



When *rePort* is selected, the *Runtime Parameter Form* shown in Figure 8-36 below will appear.



**Figure 8-36**


In order to run a report, you must provide three (3) parameters. Each of these parameters is described in Table 8-C.

| Fieldname           | Description   |
|---------------------|---|
| <b>Destype</b>      | <p>Select an option from the drop-down menu. <i>Screen</i> is the default.</p> <ul style="list-style-type: none"> <li>• <i>Screen</i> - Routes the output to the <i>Previewer</i>; truncates report if printed.</li> <li>• <i>File</i> - Saves the output to a file.</li> <li>• <i>Printer</i> - Routes the output to a printer.</li> <li>• <i>Mail</i> - Sends the output to default email application.</li> <li>• <i>Preview</i> - Routes the output to the <i>Previewer</i>; does not truncate report when printed.</li> </ul> |
| <b>Orientation</b>  | <p>Select an option from the drop-down menu. <i>Default</i> is the default.</p> <ul style="list-style-type: none"> <li>• <i>Default</i> – Use the current printer setting for <i>Orientation</i>.</li> <li>• <i>Landscape</i> – Pages are wider than they are tall.</li> <li>• <i>Portrait</i> – Pages are taller than they are wide.</li> </ul> <p>Note: Select <i>Landscape</i> for the <i>SAMS Report</i>.</p>   |
| <b>Request Date</b> | <p>Enter date you want the report to cover. Report returns all records with dates greater than or equal to the <i>Request Date</i> entered.</p>   |

Table 8-C

For your first *SAMS Report*, make the following parameter selections shown below

- **Destype** = **Screen**
- **Orientation** = **Default**
- **Request Date** = **03-31-2003**

When you're parameter selections are completed, click on , the Run Report icon. A *Report Progress* window (Figure 8-37) will appear, indicating your request is being processed

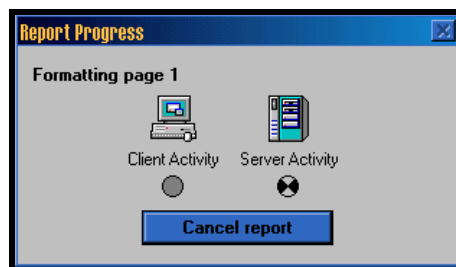
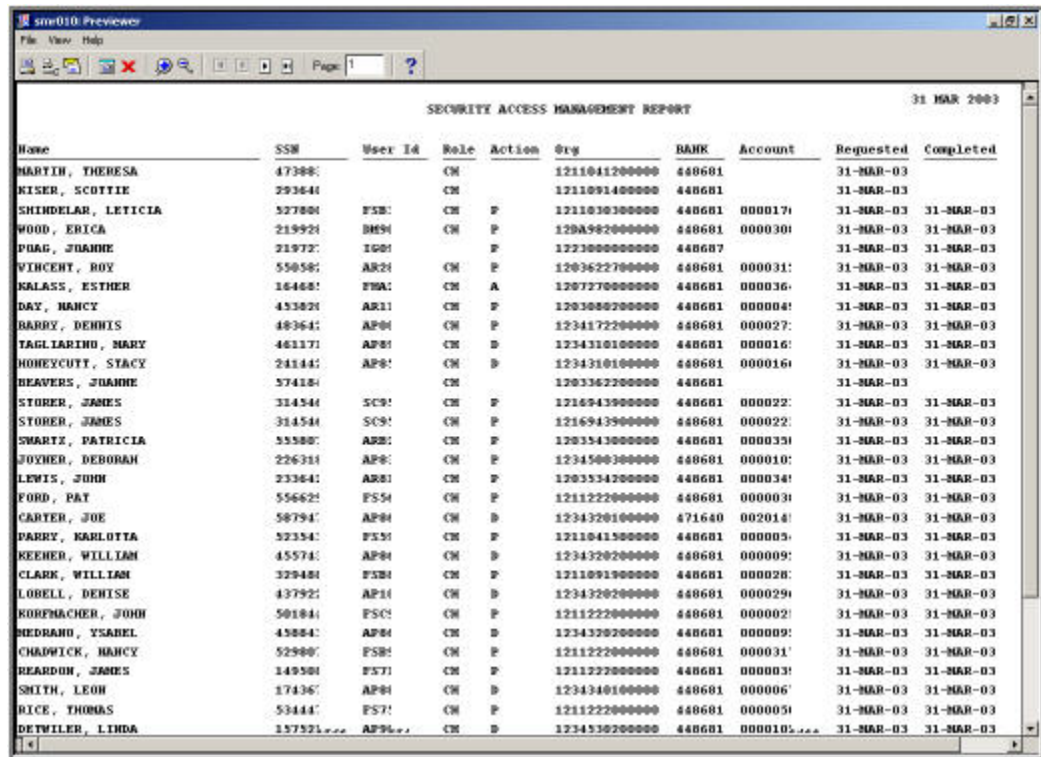


Figure 8-37

When your report is completed, your results should appear in the SAMS Report *Previewer*, similar to Figure 8-38 below. *SSN*, *User ID* and *Account* columns have been truncated for security.



| Name               | SSN    | User ID | Role | Action | Org           | BANK   | Account | Requested | Completed |
|--------------------|--------|---------|------|--------|---------------|--------|---------|-----------|-----------|
| MARTIN, THERESA    | 47388: |         | CM   |        | 1211041200000 | 440601 |         | 31-MAR-03 |           |
| KISER, SCOTTIE     | 29364: |         | CM   |        | 1211091400000 | 440601 |         | 31-MAR-03 |           |
| SHINDELAR, LETICIA | 52780: | FSB:    | CM   | P      | 1211030300000 | 440601 | 000017: | 31-MAR-03 | 31-MAR-03 |
| WOOD, ERICA        | 21992: | BMS:    | CM   | P      | 120A982000000 | 440601 | 000030: | 31-MAR-03 | 31-MAR-03 |
| POAG, JOANNE       | 21972: | IG0:    | P    |        | 1223000000000 | 440607 |         | 31-MAR-03 | 31-MAR-03 |
| VINCENT, ROY       | 55058: | AR2:    | CM   | P      | 1203622700000 | 440601 | 000031: | 31-MAR-03 | 31-MAR-03 |
| KALASS, ESTHER     | 16468: | FWA:    | CM   | A      | 1207270000000 | 440601 | 000036: | 31-MAR-03 | 31-MAR-03 |
| DAY, NANCY         | 45302: | AR1:    | CM   | P      | 1203080200000 | 440601 | 000004: | 31-MAR-03 | 31-MAR-03 |
| BARRY, DENNIS      | 48364: | AP0:    | CM   | P      | 1234172200000 | 440601 | 000027: | 31-MAR-03 | 31-MAR-03 |
| TAGLIARINO, MARY   | 46117: | AP0:    | CM   | D      | 1234310100000 | 440601 | 000016: | 31-MAR-03 | 31-MAR-03 |
| HONEYCUTT, STACY   | 24144: | AP0:    | CM   | D      | 1234310100000 | 440601 | 000016: | 31-MAR-03 | 31-MAR-03 |
| BEAVERS, JOANNE    | 57418: |         | CM   |        | 1203362200000 | 440601 |         | 31-MAR-03 |           |
| STORER, JAMES      | 31454: | SC9:    | CM   | P      | 1216943900000 | 440601 | 000022: | 31-MAR-03 | 31-MAR-03 |
| STORER, JAMES      | 31454: | SC9:    | CM   | P      | 1216943900000 | 440601 | 000022: | 31-MAR-03 | 31-MAR-03 |
| SWARTZ, PATRICIA   | 55500: | ARB:    | CM   | P      | 1203543000000 | 440601 | 000035: | 31-MAR-03 | 31-MAR-03 |
| FOYHER, DEBORAH    | 22631: | AP0:    | CM   | P      | 1234500300000 | 440601 | 000010: | 31-MAR-03 | 31-MAR-03 |
| LEWIS, JOHN        | 23364: | ARB:    | CM   | P      | 1203534200000 | 440601 | 000034: | 31-MAR-03 | 31-MAR-03 |
| FORD, PAT          | 55662: | FSS:    | CM   | P      | 1211222000000 | 440601 | 000003: | 31-MAR-03 | 31-MAR-03 |
| CARTER, JOE        | 58794: | AP0:    | CM   | D      | 1234320100000 | 471640 | 002014: | 31-MAR-03 | 31-MAR-03 |
| PARRY, KARLOTTA    | 52354: | FSS:    | CM   | P      | 1211041500000 | 440601 | 000005: | 31-MAR-03 | 31-MAR-03 |
| KEENER, WILLIAM    | 45574: | AP0:    | CM   | D      | 1234320200000 | 440601 | 000009: | 31-MAR-03 | 31-MAR-03 |
| CLARK, WILLIAM     | 32940: | FSB:    | CM   | P      | 1211091900000 | 440601 | 000028: | 31-MAR-03 | 31-MAR-03 |
| LOBELL, DENISE     | 43792: | AP1:    | CM   | D      | 1234320200000 | 440601 | 000029: | 31-MAR-03 | 31-MAR-03 |
| KORFMACHER, JOHN   | 50184: | FSC:    | CM   | P      | 1211222000000 | 440601 | 000002: | 31-MAR-03 | 31-MAR-03 |
| NEEDHAM, YSAHEL    | 45884: | AP0:    | CM   | D      | 1234370200000 | 440601 | 000009: | 31-MAR-03 | 31-MAR-03 |
| CHADWICK, NANCY    | 52980: | FSB:    | CM   | P      | 1211222000000 | 440601 | 000031: | 31-MAR-03 | 31-MAR-03 |
| REARDON, JAMES     | 14950: | FST:    | CM   | P      | 1211222000000 | 440601 | 000003: | 31-MAR-03 | 31-MAR-03 |
| SMITH, LEON        | 17436: | AP0:    | CM   | D      | 1234340100000 | 440601 | 000006: | 31-MAR-03 | 31-MAR-03 |
| RICE, THOMAS       | 53444: | FST:    | CM   | P      | 1211222000000 | 440601 | 000005: | 31-MAR-03 | 31-MAR-03 |
| DETWILER, LINDA    | 15752: | AP9:    | CM   | D      | 1234530200000 | 440601 | 000010: | 31-MAR-03 | 31-MAR-03 |

Figure 8-38

A description of each of the columns in the SAMS Report is shown in Table 8-D below.

| Fieldname        | Description  |
|------------------|--|
| <b>Name</b>      | The assigned username (e.g., da014).   |
| <b>SSN</b>       | The Social Security Number of the user.  |
| <b>User Id</b>   | The User's system identification.  |
| <b>Role</b>      | User's role (e.g., CH = Cardholder).   |
| <b>Action</b>    | The Action Code:<br>A – Add User<br>D – Drop User<br>I – Insert SAC<br>M – Modify Data<br>P – Change Password<br>R – Remove SAC<br>E - Error |
| <b>Org</b>       | User's SAC   |
| <b>Bank</b>      | Program Code   |
| <b>Account</b>   | The last ten (10) digits of the Cardholder's purchase card account number.   |
| <b>Requested</b> | Date action requested.   |
| <b>Completed</b> | Date request batch-processed and completed.  |

**Table 8-D**

Figure 8-39 depicts the tool bar icons available with the SAM Report *Previewer*. Their functionality is identified in Table 8-E.



Figure 8-39












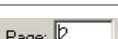

| Icon  | Function        |
|---|-----------------|
|    | Print           |
|    | Page Setup      |
|    | Email Report    |
|   | New Previewer   |
|  | Close Previewer |
|  | Zoom In         |
|  | Zoom Out        |
|  | First Page      |
|  | Previous Page   |
|  | Next Page       |
|  | Last Page       |
|  | Page Number     |
|  | Help            |

Table 8-E



## PRACTICAL EXERCISE

1. Logon to SAMS using your *Username* and *Password*. Note any messages on the *Main Menu Bulletin Board*.
2. Open the SAMS *Requests* module. Search for and locate the record of an individual under your cognizance, using *Last Name* (at a minimum) as the search criteria.
3. Open the SAMS *rePorts* module. Generate a report using a *Request Date* of the last day of the previous month.
4. Return to the *Main Menu*, and exit SAMS.

## VI. Summary and Review



**Please turn off your monitor and give your attention to the instructor.**

1. What are the main functions the LAPC performs using SAMS?
2. What are the steps for an LAPC when setting up a new Cardholder account? (Walk the instructor through the steps)
3. What would prevent a new Cardholder record from being modified in SAMS?
4. How would an LAPC deactivate a Cardholder's Purchase Card?
5. If a Cardholder loses his/her *Password*, how would the LAPC provide a new one?